North Carolina Immunization Registry (NCIR)

Searching for Clients

User Guide

Last Updated: March 22, 2022



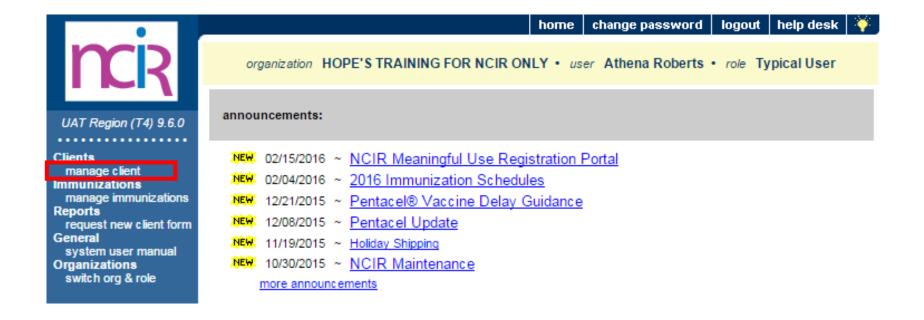


Steps for Searching for Clients



Step 1 of 2: Navigate to Client Search

Click the **manage client** link on the left menu panel.



Audience

Reports Only

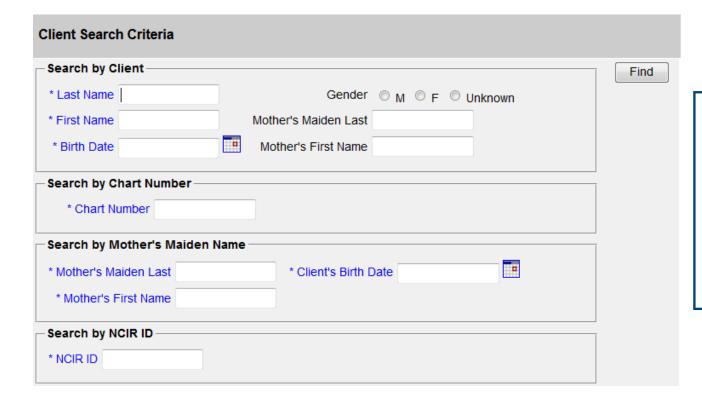
Typical User

Inventory Control



Step 2 of 2: Enter Client Search Criteria

You are taken to the **Client Search Criteria** Screen.



The NCIR receives nightly uploads from the Medicaid System that imports clients from the Medicaid database into the NCIR. Also, an upload is made into the NCIR every Thursday from Vital Records.

Audience

Reports Only

Typical User

Inventory Control

Administrator

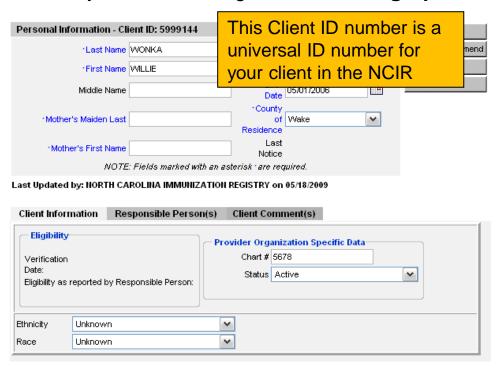
Please remember to always begin your client search by clicking on Manage Client; even if you think your client is not in the system yet, you have to always search for them here first.



Search Result 1: Exact Match

An Exact Match indicates that the NCIR recognizes the patient and they are already located within the system.

When a direct match occurs, you will be brought to the **Demographic Information Screen:**



When you reach this screen, you want to make sure to review the information listed here and check it against your current records to ensure that you have located the correct patient.

If you notice any information listed is incorrect or has changed, please update it.



Audience

Reports Only

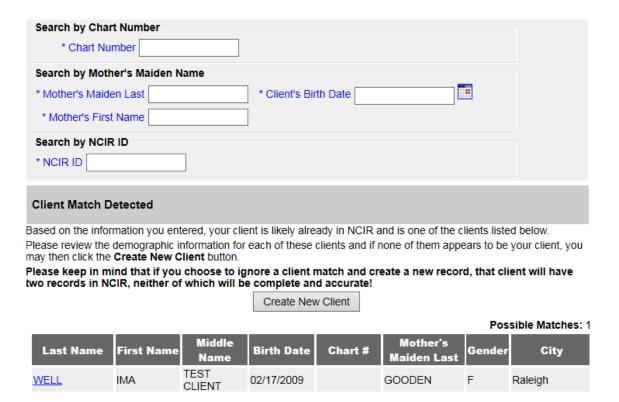
Typical User

Inventory Control

Search Result 2: Client Match Detected

This indicates that there are possible clients that match the search criteria given for the patient.

- 1. Check personal records, and review the demographic information of the patient to make sure it is accurate and correct.
- 2. Select the hyperlink of the patient's last name to return to the demographic information screen.
- 3. Once you've located the patient, review their information to verify this is the patient that you are looking for.



Audience

Reports Only

Typical User

Inventory Control

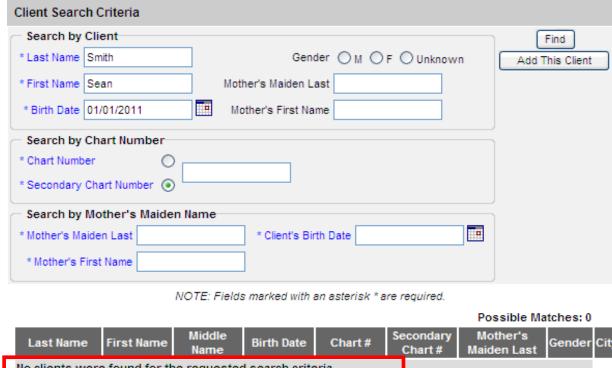


Search Result 3: No Match Detected

If your client is not the in the NCIR you will see a message that says "No clients were found for the requested search criteria."

If you cannot find a client, please try searching with fewer characters and/or less information.

After multiple attempts of locating the patient with no match, your client is not in the NCIR. You will need to enter them as a new client. (Please see Entering New Client Presentation).







Reports Only

Typical User

Inventory Control



Additional Guidance

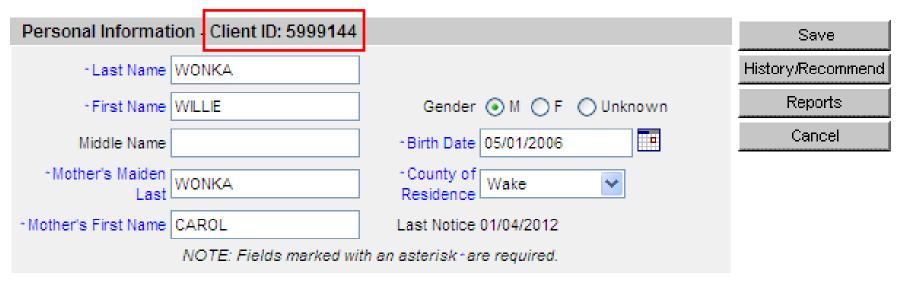


Searching for Clients Tips

- Please make sure to look up your patient prior to creating a new client, this will cause less duplicates in the registry.
- If you are experiencing issues locating the patient, try searching with fewer characters or less information.



Please Report Possible Duplicates



Last Updated by: ASHLEY'S TEST CLINIC on 02/07/2012

What to do if you find a duplicate?

- Contact the Immunization Branch through email
 - NCIRHelp@dhhs.nc.gov
- <u>Include</u> both client IDs:
 - Specify which record should be kept
 - Specify which immunizations need to be on record
- <u>Do NOT include</u> patient identifiable information (name, birth date, etc.) in the email
- You will receive a response through email when records are merged



Where to Go for More Help?





Questions?

Contact your Regional Immunization Program Consultant (RIC)

The RIC Coverage Map with contact information is located on the Immunization Branch website:

https://www.immunize.nc.gov/contacts.htm

NC Vaccines Help Desk

1-877-873-6247

(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)

https://ncgov.servicenowservices.com/csm_vaccine



Appendix



NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager

